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April 7, 1925.

FOREIGN NEWS ON NUTS

EARLY REPORTS ON EUROPEAN ALMOND CROP FAVORABLE.

Early reports to Agricultural Commissioner Foley at London from the principal almond growing districts of Europe indicate unusually heavy flowering in all regions, according to a cable received in the Department of Agriculture. Heavy frosts between March 10 and March 20 have previously been reported as causing extensive damage to the crop in Southern Italy and Sicily but Agricultural Commissioner Foley now reports that this damage is overrated for Sicily. In the Bari section, however, it is more serious. Present prospects in Spain are for a good average crop.

Almond prices in producing sections fluctuated violently during March as a result of the cold weather. On March first Palma Girgenti prices of the 1924 crop were equivalent to \$30.90 per hundred pounds, but on March 21 had risen to \$35.50. By April 1 prices had dropped to \$31.75, the difference over the March 1 price being due entirely to an improvement in exchange. September-October future prices for the 1925 crop on the above dates fluctuated correspondingly, rising from about \$26.00 per hundred pounds on March 1 to \$32.25 on March 21 and receding to \$27.60 as of the first of April.

UNITED STATES DEPARTMENT OF AGRICULTURE
BUREAU OF PLANT INDUSTRY
WASHINGTON

April 7, 1937

UNITED STATES DEPARTMENT OF AGRICULTURE

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REPORT OF THE UNITED STATES DEPARTMENT OF AGRICULTURE

During reports on Agricultural Commodities Policy at London from the principal sources of Europe indicate generally heavy flowering in all regions. According to a cable received in the Department of Agriculture from London March 10 and March 20 have previously been reported as showing considerable damage to the crop in Northern Italy and Sicily and Germany. In the latter two regions new reports show this damage is expected for Sicily. In the latter two regions, however, it is more serious. Recent reports in Spain are also very serious.

Some regions in producing sections threatened with injury during March as a result of the cold weather. On March 15th Italian official prices for 1937 crop were estimated at \$20.00 per hundred pounds, but on March 11 and March 12 prices had dropped to \$11.75, the latter being for the March 12 price being the earliest being the earliest in exchange.

On March 15th Italian official prices for the 1937 crop on the above dates were estimated at \$20.00 per hundred pounds, rising from about \$22.00 per hundred pounds on March 1 to \$20.00 on March 15 and reaching \$11.75 as of the first of April.

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FOREIGN NEWS ON NUTS

ALMOND PROSPECTS IN THE MEDITERRANEAN BASIN

The 1925 almond crop of the Mediterranean Basin on the basis of late April reports, is expected to be somewhat below the average, as a result of damage from unfavorable weather conditions during March when the trees were in full bloom, according to Mr. E. A. Foley, the American Agricultural Commissioner at London. The indications are, however, that the crop will be larger than that of both 1923 and 1924. While there has been extensive damage, it should be noted that early prospects were for an unusually heavy crop, and it appears that losses have not been great enough to cause a small crop in the Mediterranean Basin as a whole. Reports agree that the damage was particularly severe in southern Italy, southern France, and Morocco, and it is possible that the Sicilian crop will be slightly below the average, although some reliable reports indicate an average crop. The general outlook in Spain is excellent, and the crop of the Balearic Islands promises to be approximately normal.

Situation in Southern Italy.

The almond crop of southern Italy is expected to amount to not more than two-thirds of a full crop of 450,000 bales of shelled nuts, and will be only about one-third of the unusually large yield in prospect before the bad weather conditions between March 12 and 15. Estimates of the loss vary from a half to three-fourths of the crop, with a two-thirds loss most commonly mentioned. It should be observed, however, that an average crop in Apulia is considerably smaller than a full crop.

The "Mattino Economico", a prominent Naples commercial daily journal, states under date of April 5 that early indications gave promise of an extraordinarily large crop in Apulia. The flowering of the trees was most abundant and predictions were freely made that the yield would be in the neighborhood of 176 million pounds (800,000 bales of 220 lb. each) for that district. This would have been over twice the normal amount. Just at the critical period, however, when the trees were in full blossom, freezing weather, accompanied by hail storms, ruined the prospects.

The severity of the weather conditions experienced have made it certain that the crop will amount to only a little over one-third of the amount expected earlier in the season. This opinion, continues the "Mattino Economico", cannot be taken as final, but since it is based on actual observation of the trees in the areas most affected, the conclusions are probably not far from the truth. The producing regions further inland are said to have suffered most, but the coastal districts did not escape. It is reported that in some areas the crop has been completely destroyed.

Mr. Foley reports that as a result of the frost damage, prices advanced from \$69.75 to \$82.00 per bale f.o.b. Bari, but owing to the total absence of demand from abroad the rise could not be maintained. The quality called Prima Bari, which represents the good average of the season, were being offered at \$73.85 per bale at the end of April.

Situation in Sicily.

Nearly all reports now estimate the Sicilian crop at about 150,000 bales of shelled almonds. This would indicate about an average yield on the basis of past experience. The tenor of the majority of reports, however, reveals a belief that the crop will not be quite up to average, although Consul Dorsey at Catania indicates that an average crop is expected. Last year's production was estimated at 115,000 - 120,000 bales or about 75 per cent of average.

Almonds in Sicily flowered abundantly this year, and suffered from the heavy storms, hail and cold weather, during March, as was the case with practically all producing regions. Rumors of extensive damage were widely circulated thereafter, and caused the market to fluctuate widely, but these have since proved to be much exaggerated.

Estimates place the carryover from the 1924 crop in Sicily at from 15,000 to 20,000 bales. Immediate deliveries of standard Palma Girgenti at Catania warehouses were being offered at \$69.75 per bale towards the end of April. Some speculative dealings have already been made on the new crop for September-October delivery at declining prices. At the end of April the quotation on September-October deliveries was \$61.50 per bale of 220 lbs. net.

Situation in the Balearic Islands.

Mr. Foley states that the estimate of the new crop in the Balearic Islands is for a fair average one. The crop on the Island of Majorca suffered comparatively little on the whole, although the damage done in the higher lying plantations will result in a reduction of about 25 per cent from the normal yield. Mr. Foley points out that there has been a considerable increase in the planting of almond trees in Majorca recently, and taking this circumstance into account places the 1925 crop of this Island at about 60,000 bales, or considerably more than an average crop a few years ago.

Carryover stocks from the 1924 crop amount to about 3,000 bales but it is expected that these will be exhausted before the arrival of the new crop. Prices for these stocks at the end of April ranged from \$71.40 to \$72.85 per bale. Quotations on new stock goods ranged from \$62.85 to \$64.30 per bale. Quotations on the new crop, however, are only speculative.

Situation in Spain.

The general outlook for the almond crop in Spain is excellent at the present time. Weather conditions have caused considerable apprehension in certain quarters but losses have been greatly exaggerated. Reports from Valencia indicate that the March frosts caused but slight damage on the Peninsula in general. The damage was confined almost entirely to the higher lying plantations. The damage in the Tarragona district, however, was more severe. The production for export from the Tarragona district in good years is in the neighborhood of 50,000 bales. The crop in the district immediately surrounding Reus will be low because of the severe drought experienced last summer and again during the past winter. Recent rains, however, are believed to have been sufficient to save part of the harvest.

Stocks of both almonds and hazelnuts at Tarragona and Reus, the principal almond markets of northeastern Spain, are very low. Stocks of hazelnuts are estimated at about 15,000 sacks of 128 lbs. each. Practically all of the carryover supplies of both almonds and hazelnuts are in the hands of traders and speculators.

Prices on the 1925 harvest for Tarragona and Reus are not yet available. Quotations at the end of April for immediate deliveries were as follows:

Variety and grade	Unit	Price Range ^{1/}
Shelled almonds..Long shaped....	Per 220 lbs.	\$86.30 to \$87.50
Shelled almonds..Esperance	" "	" "
First quality..	" " "	86.30 to 87.50
Current quality:	" " "	82.70 to 83.90
Shelled almonds..Ordinary quality:	" " "	79.10 to 80.30
Almonds, in shell..Molars.....	" 110 "	14.14 to 14.40
Hazelnuts, shelled..First quality:	" 220 "	76.25 to 77.45
Hazelnuts, shelled.. Current "	" " "	72.40 to 73.60
Hazelnuts, in the shell.. Sifted	" "	" "
extra.....	" 128 "	20.85 to 21.60
Hazelnuts, in the shell... Sifted	" "	" "
current.....	" " "	19.90 to 20.40
Hazelnuts, in the shell..Current.	" " "	19.15 to 19.65

^{1/} Carriage and freight without insurance, London. Payment against documents with $1\frac{1}{4}$ per cent discount. Converted at average exchange for April - \$4.795.

The 1925 crop in the Alicanti district is reported as doing well. No damage has yet been reported from the growing districts, although some very cold weather and snow was experienced. The crop of the Alicanti district usually ranges from 20,000 to 23,000 bales. The Alicanti market is very quiet and the few stocks remaining are in the hands of speculators. Nominal prices prevailing during the first months of the year were as follows: Planetas \$10, Marconas \$10.71 and Comunas \$9.14 per arroba of 28 lbs.

In the Malaga district blossoming was strong and abundant and given reasonably good weather, at least a normal yield is expected. An average crop is about 39,000 bales of which 14,000 bales are Jordans and 25,000 bales Valencias. The weather during March, which covers the period of greatest susceptibility for the growing crop, was not more unfavorable than usual for that month of the year. Reports from various points of this region speak of damage in differing degrees but their tone is not pessimistic. The general opinion is that the damage was not serious. The carryover stocks are insignificant.

The following extracts from a Valencia paper "La Voz del Comercio", may be of interest in connection with the general situation in the Mediterranean Basin.

April 6, 1925. Almonds. "The almond trade is almost completely paralyzed because the available stocks are so insignificant. The cold weather recently experienced has caused damage to plantations of almond trees, thus lessening the prospects of the crop which promised to be very abundant this year. Recent information received from other almond producing countries of the Mediterranean Basin confirms earlier opinions that the damage suffered by the 1925 crop was considerable. For that reason prices during the coming season will no doubt rule at a very high figure."

April 13, 1925. Almonds. "During the last few days selling operations have taken place in the Alicante market at the rate of 72 pesetas per arroba (25 lbs.) equivalent to \$37.12 per 100 lbs. but notwithstanding this fact, holders of the small stocks available show a reluctance to sell because they are confident that prices will rise still further before the new crop is available.

"Information from London is to the effect that the arrival of large quantities of almonds from Persia was expected to cause a slump in the market, but on the contrary, prices became firmer for all qualities. Jordan and Valencia almonds are being sold little by little and prices continue unchanged. Although there is a good supply of Moroccan almonds in stock, holders of the same are not inclined to sell except at firm prices. News arriving from producing countries is alarming. It is reported from Sicily that strong winds over all of the Island may have caused still further damage."

Situation in Southern France.

The almond orchards of southern France were seriously injured by frosts during the first two weeks of March and prospects for the 1925 crop are considered very poor, according to Consul Wesley Frost at Marseilles. Leading firms in Aix-en-Provence estimate that the crop ranges from 25 to 50 per cent of normal. The normal production in this region ranges from 25,000 to 30,000 bales. Soft shelled almonds, which are ordinarily exported in the shell, are reported to have been more seriously damaged than the hard shelled varieties. Flowering has been very irregular and many trees were just blossoming in the middle of April.

Carryover stocks from the 1924 crop are small. The American and English demand was very heavy throughout the winter. As this demand was principally for shelled almonds the local firms have been shelling even their soft shelled and semi-soft shelled varieties. It is believed that the supplies at present on hand will be insufficient to tide over the summer orders and prices have become phenomenally high. Almonds in the shell are no longer quoted. The last quotation, toward the end of March was \$38.30 per bale of 220 lbs., for valley nuts and \$37.24 per bale for hillside nuts. For shelled almonds the valley shorts on April 14 were quoted at \$71.82 per bale and hillside varieties at \$70.79 per bale for delivery in the near future. For sweet shelled almonds prices ranged from \$74.38 to \$75.92 per bale. Most of the dealers consulted were unwilling to indicate price levels for the autumn of 1925.

The Situation in Morocco.

The almond crop in Morocco has been seriously damaged according to Consul H. E. Russell at Casablanca. The loss in the Haha region is estimated at 50 per cent and that in the Souss region, the other important producing section, is reported equally great, although the latter report has not been confirmed. A good harvest in Morocco is placed at from 20,000 to 30,000 bales. Exports run from 4,500,000 pounds to 9,000,000 pounds annually.

Stocks on hand as of April 18, were very low, amounting to only about 500 bales of 220 pounds. Natives state that no stocks are available in the Souss region. The Consul states that the local impression is that prices will rise considerably if the demand is resumed. No basis is yet being transacted on the basis of the new crop.



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July 25, 1925

FOREIGN NEWS ON NUTS

SPANISH AND FRENCH ALMOND PROSPECTS

Early July reports upon the almond crop in the Mediterranean Basin submitted to the Bureau of Agricultural Economics by American Agricultural Commissioner Foley at London, indicate no significant changes in the crop outlook since the report released by the Department on May 16. Prospects still point to a crop somewhat below average. The market is generally strong with prices tending to advance.

VALENCIA.-- Advice from Valencia is to the effect that there is no change in estimates of the coming crop in that district. The groves are presenting a fair aspect, with some damage being done by caterpillars. The crop is reported as abundant by Consul Henry at Barcelona. The general outlook for a small crop in the Basin as a whole, however, has resulted in a steady advance in prices at Valencia during the past three months. New crop quotations have moved with those on 1924 goods. Farmers' stock 1924 Majorca almonds during the first week in July were quoted at 555 pesetas per 100 kilos (\$36.60 per 100 lbs.) gross f.o.b. Valencia, for Sept./Oct. delivery, and new crop almonds of the same description were 520 pesetas or \$34.30 per 100 lbs. Buyers are stated to have shown willingness to pay advancing prices, and a considerable quantity of new crop goods has already been fixed.

ALICANTE.-- The almond crop is progressing well. Prospects for the new season are good, both as to quantity and quality. The trade at Alicante is of the opinion generally that prices will rule high at the start of the season but go lower as the season progresses.

PALMA DE MAJORCA.-- There has been no change in the situation in Majorca, but Commissioner Foley has revised his early estimate of the crop to 45,000 bales of 100 kilos. Prices of the grade of almonds exported to the United States are placed at 184/0 per cwt. or \$40 per 100 pounds.

MARSEILLE.-- Consul Frost at Marseille informs Mr. Foley that the crop in southern France will be very small. A leading Marseille dealer estimated it at one-tenth of normal, but this may be pessimistic. Last year's stocks are said to be entirely exhausted, although a nominal quotation of 1550 francs (\$73.32 per 100 lbs.) for best Princess shelled nuts, is still carried in the press. Nuts in the shell are not quoted. Prices promise to be exceedingly high in the south of France.

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August 8, 1925

FOREIGN NEWS ON NUTS

MEDITERRANEAN ALMOND CROP REPORTED SMALLER

The Mediterranean almond crop will be smaller than expected earlier in the season, according to reports based upon conditions in the first three weeks of July, just submitted to the Department of Agriculture by Agricultural Commissioner Foley, London. Extensive and regular revisions downward in estimates have occurred throughout the growing season for both Southern Italy and Sicily, and the crop is also being reported smaller in practically all other Mediterranean regions except in Spain and the Balearic Islands. The Spanish crop will probably be considerably larger than expected two months ago, but not enough larger to offset reductions in crops elsewhere in the Basin. The situation is reflected in prices materially higher than those prevailing during the spring and early summer.

BARI

The new crop is reported to be practically a failure in this section, and is now estimated as only one-sixth of a full yield or about 70,000 bales of shelled almonds. Earlier estimates were much higher.

Reliable sellers were still out of the market for forward delivery during the third week of July. High prices are expected for the coming season, however. The spot market has been considerably affected by fluctuating exchange prior to July, but had settled down in the middle of the month, with a firm tendency prevailing as a result of the scantiness of supplies. In Bari were ruling at about Liras 2300 per 100 kilos, f.o.b. Bari, or approximately \$85.00 per bale of 220 lbs.

SICILY

Catania.— Consul W. Roderick Dorsey at Catania reports that growing conditions have been favorable and that the trees are in good condition but that reliable estimates are placing the coming harvest of Avolas at only about one half of 1924 or about 50 per cent of a normal crop. For other grades the yield will be about equal to last year or about 75 per cent of normal. The Sicilian crop last year amounted to about 115,000 - 120,000 bales or 75 per cent of average. Consul Dorsey's latest report is a reduction from an earlier estimate of 150,000 bales.

Prices per quintal (220 lbs.) for shelled almonds, storeroom Catania, around the 10th of July were as follows:

Grade	Spot		Sept.- Oct. Delivery	
	Liras	Dollars	Liras	Dollars
Avolas, selected.....	2,500	92.50	2,500- 2,600	92.50 - 96.20
Avolas, current.....	2,400	88.80	2,400- 2,500	88.80 - 92.50
Palma Girgentis.....	2,350	86.95	2,300	85.10
Sweet, unselected.....	2,250	83.25	2,225	82.32
Bitter, unselected.....	2,050	75.85	2,025	74.92

Palermo.- Consul Edward I. Nathan, Palermo, informs Mr. Foley that the new crop is not expected to exceed 100,000 to 120,000 bales, and that stocks from last year are now said to be less than 10,000 bales. Private advices from Palermo as of the first half of July report excellent demand from abroad, both for prompt stocks and for the new crop.

Messina.- Consul L. G. Dawson, Messina informs Mr. Foley that the best authorities are agreed that the almond crop in the Messina district will be much smaller than last year. Some well informed persons state that the crop will be only 50 per cent of normal. The Consul advises that all nut crops, walnuts, filberts, etc. - as well as almonds, are reported short as a result of siroccos (winds which dry up flowers and buds), but he is inclined to discount these reports.

The above information from three points in Sicily tends to confirm the belief that the Sicilian crop in all probability will be somewhat smaller than last year's crop of 115,000 - 120,000 bales. Reports in May pointed to a crop of about 150,000 bales.

MOROCCO

The Morocco crop, reported by the Department on May 16th as being damaged to the extent of 50 per cent in the Haha region and also extensively in the Souss district, is now stated, by Consul H. E. Russell, Casablanca, to be not more than 25 per cent of last year's crop in Haha, but probably two-thirds as large as last year in the Souss region. The Marrakech groves are also said to have about two-thirds of a crop as compared with 1924. Lack of rain has been the chief cause of damage.

New crop Haha almonds were in the market and first shipments had been made in the latter part of July. The nuts are smaller this year than those from Souss, because of lack of rain. No Souss nuts had yet arrived. Prices f.o.b. Mogador as of July 20th were Francs 1560 (\$73.30) per 100 kilos for spot and Francs 1575 (\$74.00) for forward delivery. Bitter almonds were quoted at Francs 1250 (\$58.75). Last year's stocks are completely exhausted.

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TUNISIA

No estimates of the crop are yet available for the whole of Tunisia, but Consul L. L. Smith informs Mr. Foley that the crop will be less than medium, although at first expected to be very good. The local Department of Agriculture states that for the Northern section of the Regency the crop is expected to be around 4,600 quintals. The number of trees in the Regency is placed at approximately 222,000. Only a few hundred kilos of last year's crop were left near the first of July, and these were being quoted at 1,800 francs per 100 kilos, shelled (about \$84.00 per quintal at 4.65 cents per franc). Soft almonds for Sept. - Oct. delivery were quoted at 480 to 500 francs per quintal (\$22.00 to \$23.00 per quintal).

SPAIN

Reports from all parts of Spain now indicate that the crop will be considerably larger than indicated by earlier information. Mid-July reports from the Malaga region are very promising. Local production of both Jordans and Valencias is believed to be larger than has ever been known, according to Mr. Foley. The provinces west of Malaga, which produce Valencias almost exclusively, will have an exceedingly large crop. To the east of Malaga for about 90 to 100 miles, the yield is said to be fair both as regards Jordans and Valencias. The crops are reported splendid in both Alicante and Tarragona. The crop of Valencias in outlying districts are also said to appear favorable. Some estimates place the Majorca crop at 80,000 to 90,000 bales, although this figure seems high in view of previous reports, a normal crop in Majorca averaging 40,000 to 50,000 bales.

Information from Malaga states that the new crop of Jordans will be good in quality. There are no stocks of Jordans left, either in the hands of farmers or exporters. There were small stocks of Valencias left in Alicante, Tarragona and Palma de Mallorca in the middle of July, although they were negligible in quantity. All other Spanish markets are entirely bare of Valencias.

Farmers are reported as still thinking of the high prices obtained for Jordans last season, and dealers anticipate difficulty and delay in getting them to moderate their demands, which are considered somewhat exorbitant. High prices being quoted for Palma Girgentis are an important influence in causing farmers to hold out for higher figures. Prices of Palma Girgentis are also effecting the price of Valencias.

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FOREIGN NEWS ON NUTS

FIRST SPANISH ALMONDS MARKETED

Jordan almonds from the producing districts of the Province of Malaga were coming into the Malaga markets at the close of July, according to a report by Consul Austin C. Brady received in the Department of Agriculture. The principal exporting firm in Malaga, which handles from 60 to 75 per cent of the almonds exported from that port each year, was paying 70 pesetas an arroba of $11\frac{1}{2}$ kilograms or about \$40.00 per hundred pounds for unselected lots. This is 5 pesetas less than at the opening of the season last year, but about the same in terms of United States money, when the increased value of the peseta is taken into consideration. Other local purchasers were offering $67\frac{1}{2}$ to 75 pesetas an arroba (\$38.60 - \$42.90 per 100 pounds) for small lots depending upon the size.

The first shipments of almonds of the new crop from Malaga to the United States, according to the Consul were to be made during the first week in August, and the largest exporting firm was quoting the different sizes of Jordan almonds at \$11.20 to \$18.00 per box, cost and freight to New York. The market for Jordans at the close of July was regarded as uncertain, with the possibility that August might bring price changes. The small Jordans quoted at \$11.20 are packed in boxes of 25 pounds and all other sizes are shipped in boxes of 28 pounds. At the opening of the 1924 season the small Jordans were quoted at \$10.50 per box of 25 pounds, but the price later advanced to \$12.00, while the largest Jordans were at first sold at \$19.00 per box of 28 pounds, cost and freight to New York, with some later sales being made at \$20.25.

Valencia almonds usually reach the Malaga market about a month later than the Jordan crop or toward the close of August. Prices for Valencias were not yet quoted at the end of July. Opening prices last year ranged from \$8.30 to \$11.00 per box of 28 pounds, cost and freight New York, and at the time of the Consul's report it was believed that prices for the new crop would closely approach those of 1924.

Consul C. S. Edwards, Valencia, reports that prospects for the new crop in that district are good both as regards quantity and quality. He also states that prices are expected to rule high throughout the season, as a large demand is anticipated, particularly from Great Britain, with other important sources of supply, particularly Italy, Sicily and Morocco, reporting smaller crops than last year.

Almond shipments for the June quarter totaled 546,675 pounds from Valencia and 473,753 pounds from Alicante. All the shipments from Valencia went to Great Britain. Slightly more than 50 per cent of the exports from Alicante went to British ports and about one-fourth of the shipments to the United States.

Portuguese Crop

The almond crop in Portugal is reported good, according to information from Consul H. T. Mooers, Lisbon, Portugal. Further details on the Portuguese crop are expected within a short time.

Sicilian Nut Crops Short

Consul W. R. Dorsey at Catania confirms his previous report that the Sicilian almond crop will not be over 75 per cent of normal. The Consul states that prices have reached new high levels, double those for the 1924 crop, which were a record up to that time.

The outlook in Sicily for filberts is unfavorable and the yield is estimated at 30 to 40 per cent below normal, or around 70,000 quintals. Prices have remained high both as a result of the prospective short crop and the absence of old stocks. Prices had reached 700 lira per quintal (\$11.75 per 100 lbs.) in the middle of July. Sales were made in October 1924 at 565 lira per quintal (\$11.15 per 100 lbs.) and in October 1923 at 215 lira per quintal (\$4.39 per 100 lbs.).

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August 20, 1925.

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FOREIGN NEWS ON NUTS

LARGE SPANISH ALMOND CROP CONFIRMED

Almond crop prospects in the territory tributary to the Malaga export market are in general very good, and it is estimated that 300,000 arrobas, or about 3,800 short tons, of shelled almonds, may come to Malaga for export during the present year, according to a report by American Consul Austin C. Brady, Malaga, received in the Department of Agriculture. This report confirms the announcement of a large Spanish crop made by the Department on August 8.

Record Yield in Malaga Province.

Consul Brady states that it is now believed that the yield of both Jordans and Valencias in the Province of Malaga this season will be greater than in any previous year, and that the almonds will be of very good grade. The Jordan crop in this province is expected to be double that of last year, and a conservative estimate of the total production of Jordan almonds in the Mediterranean provinces of Malaga, Granada, and Almeria is 110,000 arrobas, or 1,392 short tons. The output of Valencias in the three provinces mentioned is placed at 100,000 arrobas, or 1,265 short tons. In the Provinces of Jaen and Cordoba, which produced very few almonds last year, there will be an important yield this season. New plantations of almonds are reaching the bearing stage each year in the principal producing provinces tributary to the Malaga market.

Most of the Jordan almonds produced in Spain are exported from Malaga, and this market draws supplies of Valencia almonds not only from the provinces of this consular district (Malaga, Almeria, Granada and Jaen), but also from the Provinces of Cordoba, Cadiz, Sevilla, Murcia, Huelva, Salamanca, and Zamora. Occasionally some almonds from the Provinces of Valencia and Tarragona are shipped to foreign markets from Malaga. The fact that the distribution for export of Valencias produced in these provinces is not always the same, the almonds from some sections being sold in Malaga some years and going to Alicante or other Mediterranean markets in other years, makes it difficult to estimate the quantity available for export from year to year. If unusually large quantities of Valencias from distant provinces come to this market this year, the estimate of 300,000 arrobas (3,800 short tons) probably will be exceeded.

Relatively High Prices Indicated.

No prices had yet been fixed in the middle of July for the new crop of almonds in this market, either for purchase or export, but relatively high prices were indicated, because of the reduced production in Italy and France. The farmers in the district, however are expected to base their demands at the start largely on the high prices received for last year's crop. A local exporter reports an offer from Liverpool for Valencias of 46 to 47 shillings a box of 28 pounds (\$0.39 to \$0.40 a pound), placed

at that port.

Opening sale prices of Jordans to the United States last year, per box of 28 pounds, f.o.b. ranged from \$12.90 to \$16.15, and c. & f. New York from \$13.15 to \$17.50. Opening prices of Valencias f.o.b. ranged from \$8.00 to \$9.90, and c. & f., from \$8.30 to \$12.80.

Exports from the 1924 and 1923 Crops.

In the eleven months from August 1, 1924, to June 30, 1925, 1,258 short tons of shelled almonds were exported from Malaga to the United States, as compared with 2,114 tons during the previous eleven months, according to records of the American Consular office. Reliable unofficial figures show 1,233 short tons of shelled almonds exported to other countries, during the period ended June, 1925, compared with 1,387 tons the previous eleven months. The total for the export year 1925 was 2,492 short tons, compared with 3,501 tons in 1924. Great Britain took fully three-fourths of shipments to other countries. The small amount of unshelled almonds shipped each year were included in these totals.

Statistics of Almond Shipments.

The following statistics show total exports of almonds from Malaga during the last six calendar years, to the United States and Great Britain, the principal markets, and to all other countries. The figures covering shipments to countries other than the United States are those of the customs authorities, and they are believed to be below the actual exports.

TOTAL EXPORTS OF SHELLLED ALMONDS FROM MALAGA

Year	: United States	: Great Britain	: Other Countries	: Total
	: Pounds	: Pounds	: Pounds	: Pounds
1919.....	: 3,829,331	: 2,228,156	: 1,111,200	: 7,168,687
1920.....	: 2,526,348	: 1,989,903	: 499,335	: 7,220,186
1921.....	: 4,293,503	: 2,235,171	: 462,159	: 6,990,833
1922.....	: 3,231,099	: 1,751,312	: 544,777	: 5,527,188
1923.....	: 4,099,081	: 2,069,791	: 333,856	: 6,502,728
1924.....	: 3,318,999	: 2,743,201	: 1,058,411	: 7,120,611
	:	:	:	:

EXPORTS OF SHELLLED ALMONDS FROM MALAGA TO THE UNITED STATES

Year	: Jordans	: Valencias	: Totals
	: Pounds	: Pounds	: Pounds
1919.....	:	:	: 3,821,341
1920.....	:	:	: 2,521,078
1921.....	: 1,701,181	: 2,583,357	: 4,284,538
1922.....	: 1,201,163	: 2,023,194	: 3,224,357
1923.....	: 1,704,071	: 2,386,458	: 4,090,529
1924.....	: 1,354,105	: 1,959,468	: 3,312,573

1. The first part of the document is a list of names and addresses of the members of the committee. The names are listed in alphabetical order, and the addresses are given in full, including the street, city, and state.

2. The second part of the document is a list of the names and addresses of the members of the committee who have been elected to the office of the secretary. The names are listed in alphabetical order, and the addresses are given in full, including the street, city, and state.

3. The third part of the document is a list of the names and addresses of the members of the committee who have been elected to the office of the treasurer. The names are listed in alphabetical order, and the addresses are given in full, including the street, city, and state.

4. The fourth part of the document is a list of the names and addresses of the members of the committee who have been elected to the office of the clerk. The names are listed in alphabetical order, and the addresses are given in full, including the street, city, and state.

5. The fifth part of the document is a list of the names and addresses of the members of the committee who have been elected to the office of the recorder. The names are listed in alphabetical order, and the addresses are given in full, including the street, city, and state.

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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

October 21, 1925

F.S.
AL-8

FOREIGN NEWS ON NUTS

SPANISH ALMOND MARKET FIRM

Late information from the Mediterranean region, received in the Department of Agriculture, seems to bear out all earlier reports indicating an excellent crop of almonds in Spain, but a short crop for the region as a whole. The market situation is generally strong.

Spain

The Spanish crop of both shelling and non-shelling varieties will greatly exceed that of last year, except in the case of soft shell Tarragolias, according to Trade Commissioner John H. Hynes at Rome. The quantity available for export in the shell from Tarragona, is estimated at 3,000 short tons, or 25 per cent below last year, but the crop in the Balearic Islands is placed at 1,500 tons or about three times the quantity available last year. Tarragolias are small in size, but of good quality. They were being quoted the first week of October, according to Mr. Hynes, at from $14\frac{3}{4}$ to $15\frac{1}{4}$ cents per pound c. and f. New York. Except in the Balearic Islands, where internal prices have shown some weakening tendency, the tone in all Spanish markets was generally firm.

Production of shelling varieties of almonds, figured on a shell basis, according to Mr. Hynes, is estimated as follows: In Barcelona and Tarragona 2,400 short tons, Balearic Islands, not less than 6,000 tons, Valencia and Alicante 4,000, and Malaga 4,500, of which Jordans constitute 1,800 and Valencias 2,700 tons. The yields for the above four regions are placed respectively at 10 per cent, 80 per cent, 40 per cent and 100 per cent above that of last year.

Speculative covering with limited supplies available, pushed Malaga prices on Valencia almonds 4 cents higher to 36 cents per pound, shelled, during September, according to American Consul A. C. Brady. It was not expected, however, that the high price would be long maintained, although market conditions were very uncertain at the end of the month. With prices of Valencias higher, producers of Jordans began holding off for better terms, and Jordans also advanced somewhat, as a result, selling at the close of September at from 29 to 42 cents, according to size and quality. American buyers held off until the middle of September, but important orders began coming in during the latter half of the month, with Jordans bringing 42 to 70 cents per pound, delivered in New York, and Valencias 35 to 56 cents.

It is estimated that 60 per cent of the total crop of Jordans was received by Malaga exporters up to October 1, and that the Valencias purchased up to October that date represented about 15 per cent of the total that usually comes to Malaga for export in years of heavy production. August exports to the United States totaled 150,000 pounds of shelled nuts of which 111,000 pounds were Jordans and 39,000 were Valencias. In August 1924, total exports reached only 99,000 pounds, of which 91,000 pounds were Jordans and 8,000 were Valencias.

Tunis

The last report received from Consul Ieland Smith at Tunis, states that the Tunis crop was of excellent quality, and that the native growers have been holding out for very high prices.

Damascus

Production of almonds in the Damascus district, which normally amounts to about 50 tons of shelled almonds, is only about one half of a normal crop this year. The district, therefore, will be an even larger importer of almonds than in normal years. Consumption usually amounts to about 170 tons of soft shelled almonds (weighed in the shell), and about 150 tons of kernels taken from hard shelled nuts.

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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

November 4, 1925

F.S.
AL-9

FOREIGN NEWS ON NUTS

THE SICILIAN AND PORTUGUESE ALMOND CROPS

The almond crop in the Provinces of Siracusa and Catania, Sicily, will amount to about 35,000 bales, (100 kilos each) of shelled almonds, or around 50 per cent of a normal production for the two provinces, according to a report from Consul E. C. Funk, Catania, just received in the Department of Agriculture. Production in the Province of Catania is placed at about 15,000 bales, or 15 per cent greater than last year, while in Siracusa the yield will be about 20,000 or approximately 20 per cent over last year's production.

Foreign demand is reported very small, as a result of the high prices being asked. Demand from Germany is said to be especially small, and that from Scandinavia is also much under normal. The demand from the United States and Holland, is described as exceedingly light, up to the 7th of October.

Prices, which continued high in early October, were quoted on September 30, as follows: (Conversion at exchange of 4.06 cents).

<u>Almonds, shelled, on board Catania:</u>	<u>Per 100 lbs.</u>
Palma Girgenti, sweet, ready to deliver	\$37.29
" " , Oct. 1-15 delivery	36.83
<u>Warehouse, Catania:</u>	
Sweet, ready to deliver	36.83
Bitter, ready to deliver	37.29
Avola current, Sept. Oct.	38.67
Avola, select	42.36

Quotations on almonds supplied Consul Funk by a local dealer early in October were \$36.56 per 100 pounds for almonds of the Catania district, and around \$43.87 per 100 pounds for select almonds from Siracusa and \$40.22 for other grades. (Exchange 4.03 cents).

Portuguese Crop.

The Portuguese almond crop is good in quality, and production should be large, according to Consul H. Tobey Mooers, Lisbon. No exports had yet been made up to the 8th of October, although the harvest was completed.

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UNITED STATES DEPARTMENT OF AGRICULTURE
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Washington

F.S.
AL-10

November 12, 1925

FOREIGN NEWS ON NUTS

ALMOND PRODUCTION IN TUNISIA

It is doubtful whether any considerable expansion of almond culture will take place in Tunisia in the near future, according to a report received in the Department of Agriculture from Consul Leland Smith at Tunis. As far as soil and climate are concerned, production of almonds is said to be limited only by the area of the country. Europeans, however, evince little interest as results are too slow compared with other Tunisian agricultural products. The growing is consequently largely in the hands of the natives who are slow in adopting modern methods and also use most of the yield for their own consumption, merely exporting the surplus.

Almond trees are found throughout the entire Regency but the important region is that around Sfax which accounts for approximately 140,000 trees out of a total of about 221,000. The favorite variety for cultivation is the semi-hard shell although a few soft and hard shelled varieties are also found.

Actual production figures are difficult to obtain since the nuts are used mainly for local consumption, the exports hardly attaining one-fourth of the production. Government statistics give the following figures:

Year	:	Production	::	Year	:	Production
	:	<u>1,000 pounds</u>	::		:	<u>1,000 pounds</u>
1916.....	:	3,968	::	1920.....	:	5,291
1917.....	:	5,732	::	1921.....	:	7,716
1918.....	:	4,850	::	1922.....	:	3,527
1919.....	:	6,085	::	1923.....	:	4,189

Exports are largely the raw ungraded fruit as the natives do very little to increase the value of the product. Transactions are confined largely to the semi-hard shelled variety. The quality of the nuts varies greatly. France takes the great bulk of the export, much of which goes to Aix-en-provence to be graded and prepared for market by specialists. Exports since 1920 have been as follows:

Year	:	Exports
	:	<u>1,000 pounds</u>
1920.....	:	1,725
1921.....	:	1,851
1922.....	:	522
1923.....	:	1,269
1924.....	:	889

Small sample shipments of Tunisian almonds have occasionally been made to the United States, but Consul Smith indicates that the possibility is very remote that Tunisian almonds will ever offer very much competition in the American market. The mixed character and quality of the Tunisian product are not likely to prove attractive to American buyers. Proximity to, and close connections with, the strong market in France, moreover, assure that the best of the crop will continue to be sold to that country.

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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

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December 19, 1925.

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FOREIGN NEWS ON NUTS

THE ALMOND SITUATION IN THE MEDITERRANEAN BASIN, NOVEMBER 1925

Reports on the almond situation in the Mediterranean Basin in November just received in the Department of Agriculture from Agricultural Commissioner E. A. Foley, London, in general confirm the reports issued by the Department during recent months. The crop in the Basin as a whole will be considerably below average, with late reports, if anything, tending to reduce estimates slightly rather than increase them. The indications are that the Sicilian and Spanish crops may be somewhat smaller than had been thought.

BARI.

The Bari crop is still being estimated at not to exceed 70,000 bales of 220 pounds each of shelled almonds. This agrees with estimates based on conditions in July. Some recent reports have placed the crop at around 100,000 bales. In any event the crop is far below normal, as a full crop is stated to be around 400,000 - 450,000 bales, and an average crop between 250 - 300,000 bales.

Comparatively high prices prevailed in the Bari market during the first half of November with quotations on Ia Baris ruling at about lira 2,200 per 220 pounds gross f.o.b. net, or approximately \$38.00 per bale of 220 pounds. Bari dealers at that time were of the opinion that no decline was likely because of the rapid sale of the Spanish crop and the tendency toward higher prices both in Spain and Portugal.

SICILY

Practically all recent reports from Sicily indicate that the Sicilian crop will probably be somewhat smaller than expected during the summer months. The majority of reports now place the crop at from 80,000 to 100,000 bales of shelled almonds. On September 10 the Department estimated the crop at about 106,000 bales, this being a reduction from earlier estimates. The quality of the crop, however, is said to be better than normal. Production of soft shell almonds this year is extremely small according to Vice Consul Tait, Palermo.

Most reports from Sicily indicate a somewhat easier tendency in prices during November. Foreign demand continues to be very small, especially from the United States and Germany. Germany, however, still remains the best customer for Sicilian almonds even though demand is reduced. Exports from Catania to the United States during October amounted to only 120,000 pounds as compared with 1,910,000 pounds in October 1924.

SPAIN

Spanish reports received by Mr. Foley continued to indicate that this year's crop is larger than that of last year and somewhat larger than normal. Reports from Malaga, however, are not so optimistic as earlier in the season when statements were freely made that production in that district would be the greatest ever known. Some estimates place the Spanish crop at 30 to 40 per cent above that of last year, although as yet these figures can not be accepted as accurate.

Reports from Alicante state that the quality of the crop is not up to the usual standard and that the almonds are smaller than normally. Valencia reports, however, indicate that the quality in that region is much better than it was last year. Somewhat more favorable information on the Tarragona crop has been received from Consul Henry, Barcelona and a private ^{report} places the crop of Tarragona almonds in shell mollars at 40,000 bags of 50 kilos.

The Spanish crop has been marketed and exported very rapidly this season. Fully three-fourths of this year's production was reported marketed by the middle of November and early December reports indicate that practically the entire production has been sold in advance. Only small quantities are now said to remain in the hands of speculators although earlier reports have indicated a heavy speculative interest. Prices in general have kept at a fairly high level throughout the season and are still firm, according to a cable dated December 10th from Commercial Attache Cunningham at Madrid. Prices ruling at Valencia about the 10th of November were as follows:

Mallorca	-	Selected (177/0)	\$42.90)	C.i.f.
		Proprietario (170/0)	41.20)	per bale
		Ordinary (150/0)	36.35)	of 220 lbs.

Expreses and freight amount to 8/ (about \$1.94) per bag, thus making the cost price at Palma \$40.95 for the first quality, \$39.26 for the second, and \$34.40 for the third. Ibiza almonds, unpeeled, were quoted at 60/ (\$14.55) spot in bags of 110 pounds.

The Valencia trade in some quarters has been of the opinion that almond prices would be reduced considerably after the first of the year, because of the excellent Spanish crop. Late reports, however, do not support this belief.

FRANCE

The crop in southern France is now being estimated at not over 3,000 to 4,000 bales of 220 pounds each, according to Consul Wesley Frost at Marseille. The almond trade in Marseille during November was importing large quantities of Spanish almonds and Italy was buying some French bitter almonds on the Marseille market. Prices at Marseille around November 10th for "Amandes Cassees" (shelled nuts) varied from 2,000 to 2,050 Fr. (\$79.40 to \$81.40) per 220 pounds. At the same time last year prices ranged from 1,200 to 1,300 Fr, equivalent to \$63.25 to \$68.50 per 220 pounds.

PORTUGAL

While no estimates are yet available, the Portuguese crop is now definitely known to have been large and also of good quality, according to information from Consul H. Tobey Mooers, Lisbon. A good demand has been experienced and it is expected that exports will far exceed those of 1924, which amounted to 622,000 pounds for unshelled nuts and 3,335,000 for shelled nuts. Prices of shelled almonds on November 27 were Esc. 230 \$00 per 15 kgs. (equivalent to \$35.60 per 100 lbs), and for unshelled, Esc. 60 \$00 per 15 kgs. (equivalent to \$9.20 per 100 lbs). (Exchange 5.11 cents).

MOROCCO

The 1925 almond crop in Morocco will amount to around 15,000 bales of 220 pounds or between 55 and 60 per cent of last year's production, according to information received from Vice Consul in Charge Elkington at Casablanca. The production in the Sous and Haha regions which account for about 70 per cent of the entire production of this country is estimated at about 11,000 bales compared with 19,500 last year. The nuts this season are of small size.

Exports through Mogador, which handles practically all the shipments, amounted to 7,418 bales for the season up to October 15. Stocks in Mogador, presumably at the time of the Consul's report (November 13), amounted to 800 - 900 bales, while the quantity of the 1925 crop still in the Sous and Haha region was estimated at 2,000 to 2,500 bales. Arrivals on the markets from the Manakosh and Tadla regions are reported to be small. No decline in prices in the near future was expected on November 13 in the Magador market.

